

SAP Training



Benefits Display Overview BN200



SLIDE 1


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Welcome to the *OSC HR/Payroll SAP Benefits Display, BN200* training course.

Notes:

Benefits Curriculum

- Pre-requisites for Benefits Display, BN200
 - Beacon Overview, BC100
 - SAP Basic Navigation, BC110
 - Personnel Administration Overview, PA200
- Today's course - Benefits Display, BN200
- Post-requisites
 - BI Workshop



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This slide lists the three pre-requisites you must take before attending this class. Attending these pre-requisites ensures that you are adequately prepared to learn the new processes, concepts, terms, and data display skills covered in this course.


This course is for those individuals working at state agencies, departments, and BEST Shared Services who have been granted authorization to display benefits information for individual employees.

Notes:

SAP Training — Welcome

Welcome to the Display Benefits course

- Introductions
- Sign the Training Attendance Sheet
- Classroom Etiquette
- Cell phones off
- No side conversations



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Notes:

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

Course Map – Benefits Display Overview


Lesson 1: Benefits Process Overview

Lesson 2: Employee Participation Overview

Lesson 3: Benefits Infotypes

Lesson 4: Benefits Letters and Reporting

Lesson 5: Course Review



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Notes:


Course Objectives

Upon completion of this course, you will be able to:

- Describe the benefits enrollment and plan administration processes
- List the tasks performed by Agency HR and BEST Shared Services for benefits administration
- Search for an employee and view available benefit infotypes on the employee's record using transaction code **PA20** and a summary overview using **HRBEN0006**
- Explain the purpose of adjustment reasons
- Display information about the benefits of individual employees using the Participation Overview
- Display benefits confirmation forms and letters

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Notes:

This course explains how to display employee benefits information online using benefits infotypes and the Participation Overview transaction. The course will also cover how to print confirmation forms and run benefit reports necessary to your role.

Strategy for Training

- Tell me

Concepts

Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN
- Show me

Demonstrations


Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF
- Let me

Exercises

Student will complete the exercises which allows for hands-on practice in class – HANDS ON
- Support me

Availability

Instructor will be available to answer questions while the students complete the exercises.



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Notes:

The *Benefits Display Overview* student guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to take notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the SAP training environment (Sandbox).

All of the references, job aids, and simulations that are used in this class are available on BEACON University. For the most up-to-date versions, you should always use the materials on the BEACON University website.

Your Student Guide

- Contains all the information you need for this course
- Can be used as a reference when you return to your workplace
- Is organized by lessons with
 - Business process information
 - New concepts and terms
 - Exercise details
 - Review activities



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Notes:

Your student guide is written in an outline style. It is not designed to be read verbatim but rather used as a guide. It contains background information and review activities. The exercise information including:

- Scenarios
- SAP menu paths and T-codes (transaction codes)
- Data to enter
- Reference to the online help

Reference Materials

- Student Guide
- Job Aids
- Other resources
 - Online help
 - Simulations
 - Work instructions
 - “What’s New”



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Notes:

INTegrity

DEACON

CONSISTENCY

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Course Map – Benefits Display Overview

Lesson 1: Benefits Process Overview

Lesson 2: Employee Participation Overview

Lesson 3: Benefits Infotypes

Lesson 4: Benefits Letters and Reporting

Lesson 5: Course Review

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Notes:

Lesson 1 Objectives



Upon completion of this lesson, you should be able to:

- Identify the policies the system will enforced
- Describe the roles and responsibilities of key personnel
- Explain the benefits business processes
 - Annual Enrollment for NC Flex and SHP (State Health Plan)
 - Adjustment Reasons
 - New Hire enrollment
 - Leaves of Absences (LOA)
 - Savings Plans Enrollment
 - Life Changing Events
 - Retirement Plans
 - Benefits Termination
- Explain how SAP determines which benefits to offer an employee

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Notes:

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Scope of SAP's Benefits Administration Module

- SAP's Benefits Administration module manages activities associated with people's benefits.
- These four benefit plans are maintained in SAP:
 - Health Plans (Medical, Dental, Vision, Cancer, Critical Illness)
 - Insurance Plans (Term Life, AD&D)
 - Savings Plans (Retirement and 401K, 403(b) and 457 plans)
 - Spending Accounts (FSAs)

Health




Insurance



Savings

\$\$

Flexible Spending Accounts



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With the implementation of SAP, Benefit Administrators and employees now have a streamlined benefit enrollment and management process. Additionally, the process to manage benefit deductions becomes more accurate and timely. This slide outlines which plans are maintained in SAP's Benefits Administration module.

Notes:

Benefit Plan Changes that are Enforced

- NC Flex Plans
 - Start date is the first of the month following the qualifying event
 - Life insurance cost is calculated on the age of the employee as of January 1st
 - Critical illness is calculated on the age of the employee as of January 1st and also the age of the spouse, if covered under the plan. All children are under the same rate.
 - FSA plan contributions will not have a monthly limit but will have a yearly limit
- State Health Plan
 - Standardized coverage end date



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Notes:

Key benefits of business SAP processing are:


- The standardization of business processes, policies, and procedures across agencies and departments
- Real time access to data
- Streamlined enrollment process
- Streamlined tracking, reporting, and printing capabilities
- Improved exchange of employee data with vendors
- Increased data integrity resulting from centralization of transactional duties
- More efficient processing of employee changes to or termination of benefits
- A list of streamlined action and action reason codes to improve reporting capabilities

Roles and Responsibilities - Employees



Employees are responsible for:

- Enrolling themselves in the various health, insurance, savings, and Flexible Spending Account (FSA) plans.
- Keeping their information updated by notifying their Agency HR within 30 days of a life changing event.
- MUST use ESS to complete their enrollment(s).



Employee

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NOTE: As presented in prerequisite courses, an Employee Self Service (ESS) web portal provides employees online access to maintain personal information in the OSC HR/Payroll system. ESS allows employees to access their benefits information online and make changes online during enrollment periods.

Notes:

Roles and Responsibilities - Agency HR



Agency HR is responsible for:

- Performing basic employee benefits data inquiry
- Printing confirmation forms
- Communicating benefit information to employees
- Maintaining and managing supplemental benefits
- Performing employee benefits data inquiry regarding
 - New Hire
 - Life Changing Events
 - Annual Enrollment
 - Leave of Absences
 - Benefits Termination
 - Savings/Retirement Plan
- Printing benefits reports



HR Agency /Department
"Representative"

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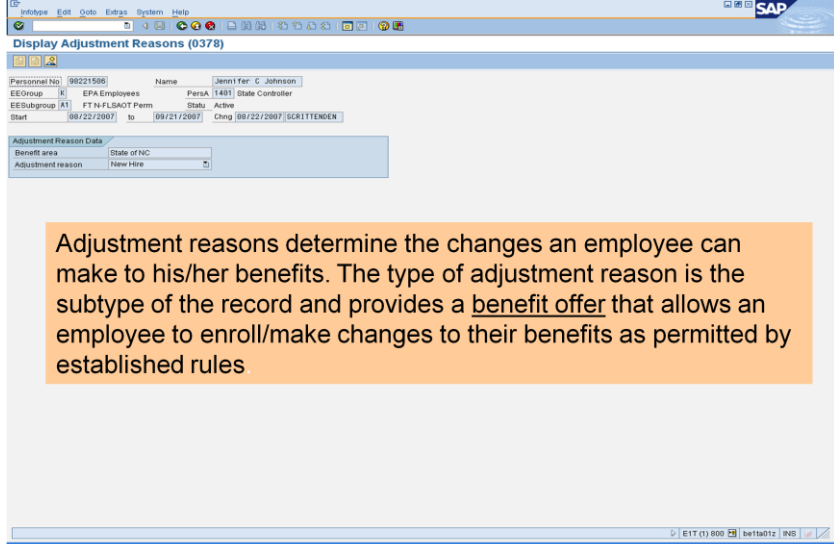
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Notes:

The Display Benefits role is held by selected positions in HR Agency/Department and the Office of Personnel.

The Agency HR must create adjustment reasons for "Life Changing Events", for example, marriage.

Adjustment Reasons (Infotype 0378)



The screenshot displays the SAP 'Display Adjustment Reasons (0378)' interface. At the top, the title bar reads 'Display Adjustment Reasons (0378)'. Below it, the personnel data for Jennifer C. Johnson is shown, including Personnel No. 98221586, Name Jennifer C. Johnson, PersA 1431 State Controller, EEGroup K EPA Employees, EESubgroup A1 FT N FLSAOT Perm, Status Active, Start 08/22/2007, and End 08/22/2007. The 'Adjustment Reason Data' section shows Benefit area State of NC and Adjustment reason New Hire. An orange text box explains that adjustment reasons determine benefit changes and provide a benefit offer.

Adjustment reasons determine the changes an employee can make to his/her benefits. The type of adjustment reason is the subtype of the record and provides a benefit offer that allows an employee to enroll/make changes to their benefits as permitted by established rules.

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Notes:

Adjustment reasons


Adjustment reasons explain why benefits elections are being created or changed outside of open enrollment periods. The validity of this record represents the period within which the employee can make changes to benefit elections. Thus when an employee has one of these infotype records, the system produces a benefit offer in enrollment that is valid for the validity period of this record. The benefit offer allows a restricted set of changes to existing enrollments. The adjustment reasons configured in SAP are in accordance with the State's benefits policies. Examples of Adjustment reasons include:

- New hire
- Marriage
- Divorce
- New birth
- No longer a student


Refer to the adjustment reasons job aid for a complete list of reasons.

Roles and Responsibilities - BEST Shared Services

The Benefits Representatives will have full access to create, change, and maintain benefits plans and employee benefits elections.



**BEST Shared Services
"Representative"**



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Notes:

This role is responsible for overseeing benefit processing. More specifically this role has enhanced reporting capabilities. When necessary, the role completes data entry of benefit enrollment information, prints enrollment and confirmation forms, and enters appropriate adjustment reasons into the system. The role also processes LOAs and benefit terminations.

NOTE: As presented in prerequisite courses, you learned that the BEACON Enterprise Support Team (BEST) Shared Services Center centralizes data entry and transaction-based activities including NC Flex, State Health Plan, Retirement Plan, and Savings Plan data entry activities. Agency-specific supplemental plans are the responsibility of the agency.

Key Processes – Annual Enrollment




- Employees will be able to use Employee Self Service (ESS) to complete benefits enrollment online.
- The Benefits Administrator (BEST Shared Services) will enroll employees that do not have access to ESS using paper enrollment forms.
- When the Benefits Administrator enrolls an employee or the employee uses ESS to enroll, the deductions will automatically be taken from their paychecks.
- System interfaces with vendors will replace paper forms providing enrollment data.

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Notes:

SHP / NC Flex Annual Enrollment Period



- NC Flex Annual Enrollment Period
 - Usually occurs in the Fall
- SHP Annual Enrollment Period
 - Usually occurs in the Spring
 - NC PPO Smart Choice Plans – employee must complete the State Health Plan Attestation Form to re-enroll in the 80/20 plan each year.
- All employees eligible for SHP benefits are required to enroll if the employee wants coverage.
- The appropriate Adjustment Reason is created by BEST Shared Services for all eligible employees.

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Notes:


Flexible Benefits Program: NC Flex

NC Flex, the statewide flexible benefits program, offers the employee the advantage of paying for certain benefits with pre-tax dollars. This saves employees money and allows their paycheck to stretch a little further. Many state employees are benefiting from pre-tax programs on health insurance premiums and dependent care costs, but NC Flex expands the savings even further through spending accounts, a statewide dental program, and accidental death and dismemberment insurance. There is also a voluntary vision plan available to employees.


NC Flex Plans

- Statewide Voluntary Dental Plan
- Statewide Voluntary Vision Plan
- Statewide Voluntary Cancer Plan
- Statewide Voluntary Critical Illness Plan
- Flexible Spending Accounts:
 - Health Care (HCFSA)
 - Dependent Care Expenses (DDCFSA)
- Statewide Voluntary Accidental Death and Dismemberment
- Core Accidental Death and Dismemberment
- Group Term Life

SHP / NC Flex Annual Enrollment Process




1



Louisa Agency
HR Staff

- Announces NC/SHP Flex Annual enrollment process to employees
- Conducts information sessions
- Answers employees questions
- Prints employee confirmation form as needed

2




Keith, employee

- Enrolls in plan using ESS
- Prints confirmation form

OR

- For EEs without ESS access only - complete paper forms and submits them to BEST Shared Services

3



Mary, BEST
Shared Services
Benefits
Administrator

- For employees that do not have access to ESS, enters their benefit elections for SHP/NC Flex plans

NOTE: An adjustment reason is created automatically when the plan is "opened" for enrollment by BEST Shared Services.

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Notes:


NC/SHP Flex Annual Enrollment Process Overview

The NC/SHP Flex Annual Enrollment process includes all employees who are eligible for NC State benefits or SHP benefits. It uses the Employee Self-Service where possible, limited only to the employee's ability to access a computer and sign on to select benefits. Where access is unavailable, the employee completes a paper enrollment form and beneficiary information and returns completed forms to the Benefits Administrator for verification and entry into the SAP system.

This new functionality alleviates the need, during annual enrollment, for those employees with access to ESS to complete paper enrollment forms and for the Benefits Administrator to send the forms to the Benefits vendors for NC Flex benefits enrollment. It also allows the SAP system to be the system of record for enrollment. An electronic enrollment/change data file is sent to vendors instead of paper forms.

SHP and NC Flex will not provide any enrollment forms in their "Enrollment Kits" for SAP Agencies.


Agency HR will need to download forms from the vendor websites to provide to employees not using ESS. Employees can also access the forms directly from the vendor websites.



1

Hiring person


- The process begins in agency HR using Workflow.
- The Adjustment Reason "HIRE" is created dynamically during the New Hire process.



2

Jessica, agency HR

- The new hire events are created in the system by agency HR in the background.
- Agency HR must contact the employee in a timely manner regarding the employee's benefits eligibility.
- HR provides employees with NCIDs and instructions to log in to OSC HR/Payroll & ESS.



3

Beth, newly hired employee

- Once created the employee enrolls in ESS.
- For employees without ESS access only, complete paper forms and submit them to BEST Shared Services.

Note: Timely entering of the New Hire action is important. There is a 30-day window of opportunity in which employees are eligible to enroll in benefits programs from the date they are hired *regardless* of when the action is entered in the system.

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Notes:

New Hire Enrollment

An employee must be hired before any benefits action can be performed. Employees with previous state work history must be rehired. When an employee is hired or rehired, a reason code is added to the employee's master data. The Reason for Action code details the specific reason for the hiring action.

Examples of Reason for Action:

- Hire
- Rehire

There is a 30-day time frame for employee enrollment. For example, if an employee is hired 11/17/08, he/she has until 12/17/2008 to enroll in benefits. If the hiring action is not entered until 12/1/08, the employee still only has until 12/17/08 to enroll.

Leave of Absences


1



Louisa, agency
HR Data
Maintainer

- Agency HR Data Maintainer puts employee on Leave of Absence (LOA).

2



Brenda, Agency
Benefits Specialist

- Agency Benefits Specialist:
 - generates LOA letter and sends to employee

3



Mary, BEST
Shared Services
Administrator

Terminates employee's NC Flex Plans in SAP (regardless of whether or not EE continues plan payment to vendors).

Monitors and maintains the eligibility of the State Health Plan coverage.

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Leave of Absences (LOA): Agency generates Continuation of Benefits during LOA Notice (ZBNS008).

Notes:

State Health Plan

- For continued coverage, monthly premium payments need to be sent to BEST.
- If payment not received on a monthly basis, State Health Plan coverage will be terminated.
- EEs receiving STD benefit payments will have their premium payments deducted on an after-tax basis.

NC Flex

- BEST notifies the NC Flex vendors of employee's LOA by delimiting the EE's benefits in SAP.
- Employees can choose to continue their NC Flex benefits by making payments directly to the vendor(s).


Return From (LOA)

- Employees contact their HR regarding their return to work effective date.
- For return from LOA, HR completes Reinstatement Action, the Adjustment is dynamically created. Employees complete the enrollment process with ESS (Employee Self-Service).

NOTE: The employee can only re-enroll in the same Benefits elections s/he held prior to the LOA. Must restart the Health Care Flexible Spending Account.

Mandatory State Retirement Plans

- Enrollment in Mandatory State Retirement Plans is created automatically. (TSERS, LEORS, CJRS)
- BEST Shared Services monitors the system to ensure the correct employee is enrolled in the right plan.
- The retirement system notifies the employee directly to collect beneficiary information.
- Optional Retirement Program (ORP) Retirement (where agencies coordinate enrollment with BEST Shared Services)
 - Employees have 60 days from their hire date to complete retirement plan selection.



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Retirement Plans

Mandatory state retirement plans are created automatically.

NOTE: NC School of Science & Math will notify BEST Shared Services when a faculty member enrolls in the Optional Retirement Program (ORP). BEST Shared Services completes the retirement enrollment in the system. Eligible agencies have reporting capabilities to monitor employee enrollment.

Notes:

Supplemental Savings Plan Enrollment



- 401(k) and 401(k) Roth Savings plans
- 457 Deferred Compensation plans
 - Vendor Website: www.NCPlans.prudential.com
 - Phone: 1-866-NC401(k)1
1-866-624-0151
- 403(b) plans paper enrollment form for Salary Reduction Agreement
 - Standardized form for all 403(b) plans

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Notes:

Supplemental saving plans include:


- 401(k)
- 401(k) Roth Savings plans
- 457 Deferred Compensation plans
- 403(b) plans (Salary Reduction Agreement form)
 - Agencies who have 403(b) plans are required to have the employee complete the form.
 - The employee then returns the form to BEST Shared Services.

The vendor of the savings plan will know if the employee is eligible for the plan.

- 401(k) New hires can enroll:
 - By telephone directly with the vendor
 - Online (online enrollment requires User ID & Password created by the employee)
 - Sending a paper form to the vendor
- 457 Deferred compensation plans automatically send a PIN number to all newly eligible employees:
 - By telephone directly with the vendor
 - Online (online enrollment requires User ID & Password created by the employee)
 - Sending a paper form to the vendor

Life Changing Events


1



Maria, Employee

- Employee notifies the agency HR of a Life Changing Event


2



Wendy, Agency HR

- The agency HR confirms the life changing event
- Following confirmation of the event the agency HR creates the Adjustment Reason in the system

3



Maria, Employee

- Employee logs onto ESS to make changes.

NOTE:
If the employee wants to enroll in the SHP late and does not have a life changing event, the employee must contact BEST Shared Services.

- Agency HR is responsible for creating the appropriate Adjustment Reason for all Life Changing Events.
- Only employees are allowed to enroll in SHP as "Late Enrollees".

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Notes:

Dependents must have a qualifying event or wait until annual enrollment.


Qualifying events are also called “Family Status Changes” in many of the agencies.

NOTE:

Instructions on how to create Adjustment Reasons are available in the *PA310 Master Data Maintainer* course and the Web-Based Training course available through the OSC HR/Payroll Training website.

Benefits Termination


1



Louisa,
agency HR

- Agency HR terminates the employee in OSC HR/Payroll.


2



Jose, BEST
Shared Services

- BEST Shared Services runs a process to automatically end Benefits.


3



Louisa,
agency HR


- Agency Benefits Specialist generates and mails a Benefits Termination letter.

4



Bill,
terminated
employee

- A Benefits Termination letter is mailed to the employee.



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Notes:

Benefits Termination


An automatic batch is run nightly to stop benefits for employees who have separated from service. When an employee loses eligibility for reasons other than termination, an adjustment reason is created in the employee's master record and BEST Shared Services terminates the employee's benefits.

Health Plan Termination (OSC HR/Payroll Reference Guide for State Employees):

"If an employee terminates (last work day) from the 1 – 15 of the month, a health plan deduction does not occur for that month and the employee's coverage ends at the end of the current month. If an employee terminates (last work day) from the 16 – end of month, a health plan deduction will occur for that month and the employee's coverage ends at the end of the following month."

How SAP Determines Participation Eligibility

- SAP uses Program Groupings to determine employee benefits eligibility participation.
- SAP uses a combination of the following fields to determine the values for Program Groupings:
 - Employee group
 - Employee subgroup
 - Personnel area
 - Planned work time



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It is important to understand that SAP uses a combination of organizational assignment data, such as Personnel area (agency), and Program Groupings to determine in which benefits plans an employee is eligible to participate. Program Groupings is technical jargon for a set of rules used by SAP to sort employees into different groups, depending on which plans you offer to different groups of employees. The Program Groupings used by OSC HR/Payroll are explained in the following six slides.

NOTE:

Employee group – The purpose of the Employee group is to define the position's appointment type such as SPA, EPA or supplemental staff as a few examples. It is used to establish rules for calculating leave and managing pay.

Employee subgroup – This field defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime and full-time/part-time status.


Personnel area – The Personnel Area is tied directly to the company code and is used by Payroll to identify the specific agency for whom the employee works. A company code can include one or more Personnel Areas.

Planned work time – This infotype determines the weekly planned working time for a position.

Notes:

SAP Program Groupings

- Benefit Area
- 1st Program Group
- 2nd Program Group



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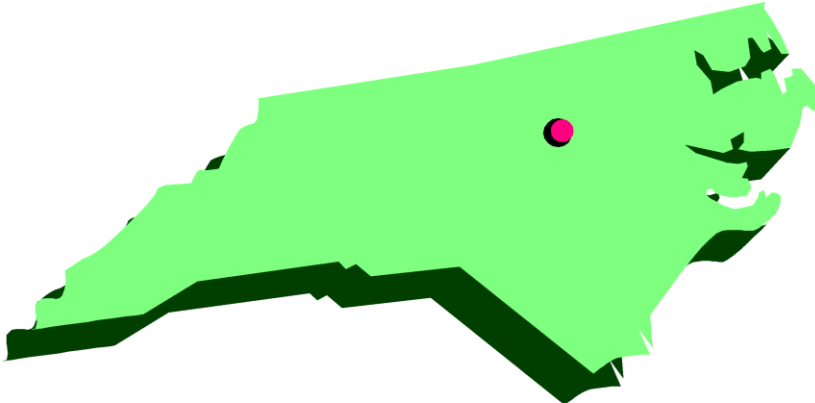
SAP uses these three program groupings to determine which benefits plans are offered to an employee:

- Benefit Area
- 1st Program Group
- 2nd Program Group

Notes:

Benefit Area

- The benefit area can be defined as a benefit pool area. In the OSC HR/Payroll system one benefit area has been defined for the state. The SAP field code is:
 - “NC” for State of North Carolina



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The Benefit Area is the first sub-division of benefit information. The State of North Carolina has defined one benefit pool that contains all state employees.

Notes:

1st Program Grouping

The 1st program group is used to sort employees into distinct groups based on plan eligibility. OSC HR/Payroll has established the following groups:

Field Value	Description	Definition
FULL	Full Benefits eligible	EE works greater than or equal to 30 hours/week
BNR	Benefits no retirement	EE works greater than or equal to 20 hour/week but less than 30 hours/week
NOB	No benefits	EE works less than 20 hours/week or EE is a temporary/contractor – Hours do not matter for these employees because they are not benefits eligible



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The first program grouping allows you to sort the “Benefit Area” into different groups, depending on which plans you offer to different groups of employees. OSC HR/Payroll has defined three first program groups based on the planned worked hours and employee groups such as SPA, Permanent, Probationary, Time-Limited, etc. The following descriptions summarize the eligibility rules for the State Health plan, NC Flex plans, and the State Retirement system based on the planned worked hours.

State Health Plan (SHP)

If employees work at least 30 hours per week, they and their dependents are eligible to enroll in a health insurance plan. The state pays for employee coverage in the State Health Insurance program. Employees must pay for family or dependent coverage. If an employee works at least 20 hours but less than 30 hours per week, the employee is still eligible for the SHP but on a full contributory basis.

NCFlex

Employees are eligible to participate in NCFlex if they are a state agency, university or select community college employee working 20 or more hours per week in a permanent, probationary or time-limited position. They may check with their Agency HR concerning their benefit eligibility.

Retirement

An employee with a permanent, probationary, time-limited or trainee appointment, who works at least 30 hours per week for nine months of the year, is automatically a member of the State Retirement System. Participation in the Retirement System of North Carolina is mandatory for every permanent, probationary, time-limited or trainee appointment employee who works at least 30 hours each week.


Notes:

2nd Program Group

This group is determined by a combination of the Personnel Area and retirement plan.

Examples:

Personnel Area (Agency)	Retirement Plan	2nd Program Group
AOC	CJRS	B001
DOT	LEORS	BO12
OSP	TSERS	B014



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The 2nd Program Group is used to further sort employees into a more distinct sub-group based on the employee’s agency and retirement plan eligibility. The most common group is B014, which denotes the benefits plans available to a regular state employee and includes the Teachers and State Employees Retirement System (TSERS).


Please refer to the Benefit Program Groupings job aid located on the BEACON University web site for a complete list of benefit program groupings.

Notes:

Program Groupings - Example 1

Benefit offer for Full and B014 Program Groups:

- TSERS
- PPO plans
- NC Flex
 - Dental
 - Vision
 - Cancer
 - Life
 - AD&D
 - HC FSA
 - DDC FSA
 - Critical Illness
- 401K Savings plan
- Roth 401K Savings plan
- 457 Savings plan



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As an example, this slide lists the benefit offer to an employee that falls in the following program groups:


1st Programming Group = FULL

2nd Program Group = B014

NOTE: 403(b) Saving plans are an agency-specific benefit. Five agencies offer 403(b) savings plans.

Notes:

Program Groupings - Example 2



Benefit offer for the BNR and B014 Program Groups:

- PPO plans (EE paid)
- NC Flex
 - Dental
 - Vision
 - Cancer
 - Life
 - AD&D
 - HC FSA
 - DDC FSA
 - Critical Illness
- 457 Savings plan

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As an example, this slide lists the benefit offer to an employee that falls in the following program groups:


1st Programming Group = BNR

2nd Program Group = B014

NOTE: Retirement plans are not part of BNR. Employees are responsible for the full cost of premiums.

Notes:

Program Groupings – Example 3



Benefit offer for the NOB and B014 Program Group:

- No plans are offered

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Although the SAP system will not offer benefits plans to employees in the NOB 1st Program Group, the system still displays the valid 2nd Program Groups based on the employee’s combination of the Personnel Area.

Notes:


Lesson 1 Review

In this lesson, you learned to:

- Identify what policies the system will enforce
- Explain the Roles and Responsibilities of the key players
- Describe the benefits business processes
- Explain how SAP determines which benefits to offer an employee

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Notes:

Course Map – Benefits Display Overview


Lesson 1: Benefits Process Overview

Lesson 2: Employee Participation Overview

Lesson 3: Benefits Infotypes

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Notes:

Lesson Objectives

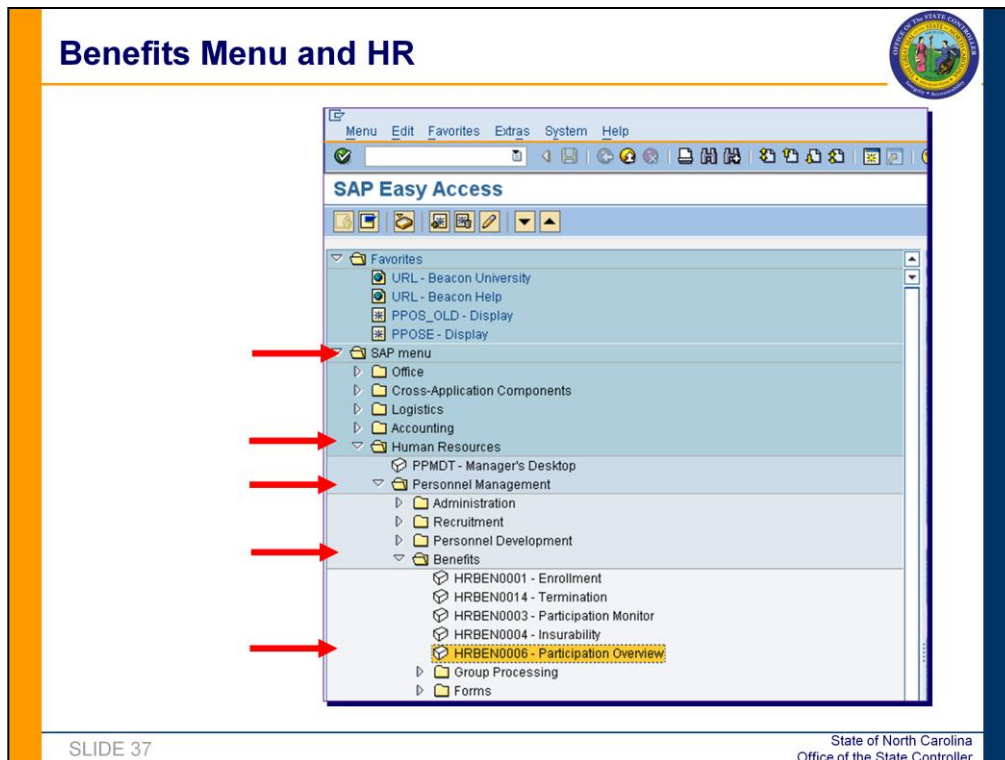
Upon completion of this lesson, you should be able to:

- Display information about the benefits of individual employees using the *Participation Overview*, **HRBEN0006** SAP transaction

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Notes:



Notes:

Benefits is a component of Personnel Management and is found below Personnel Management in the SAP standard menu. In this lesson you are going to learn how to use the Participation Overview transaction to inquire on an employee's benefits information.

The Participation Overview, **HRBEN0006** transaction allows you to display a summary list of all of the benefit plans in which an individual employee is enrolled. From the *General Overview of Benefit Plan Data* screen, you can select (or highlight) a plan and then display employee information for the plan.

To access the Participation Overview from the SAP Easy Access menu, choose *Human Resources > Personnel Management > Benefits > Participation Overview* or type **HRBEN0006** in the Command field and then press the **Enter** button.

Navigation Tip: To display transaction codes in the Easy Access menu:

1. Select **Extras > Settings** to display the settings dialog box.
2. Select the Display technical names checkbox.
3. Click the Continue (Enter) button. The transaction codes will now display in the menu tree.

Participation Overview, HRBEN0006 Initial Screen

Selection area

Processing area

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Notes:

To display benefit information for an employee, perform these actions:

1. Select the employee for whom you want to display an overview. The employee will display in the Employee List area of the screen.
2. Click on the employee to display his or her benefit information in the Processing area. Once an employee has been selected, the following tab pages will become active, showing the different categories of information:
 - Plans
 - Costs
 - Master data
 - Overview

Employee Search by Name

- Search by Name - Use '*' wildcard
 - Example: To search by name for records of employee Jones, type jo* and press Enter for a list of possible entries

Restrict Value Range (1)

Last name - First nameIC numberOrganizational assignment

Last namejo*First name

Personnel Number (1) 2 Entries found

Last name - First nameIC numberOrganizational assignmentFree se...

Last na	First name	Title	Pers.No.	Start Date	End Date
Johnson	Jennifer		98221506	11/19/1971	12/31/9999
Jones	Joanne		90000024	04/15/1977	12/31/9999

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Notes:

Employee Search by Personnel No.

Use this shortcuts for searching in the personnel number field:

- Type “=n.” then letters of an employee’s last name

Display HR Master Data

Personnel no. =n.br

Personnel Number (1) 416 Entries found

Time Data Administrator Schedules Last name - First name

Basic Personal Data

Last name	First name	Title	Pers.No.	Start Date	End Date
Brady	Phil		09000015	08/01/1974	12/31/9999
Briggs	Cleveland		70139485	03/03/1957	12/31/9999
Brinigh	Rowanne		70141894	09/07/1972	12/31/9999
Brittian	Matt		09000016	10/01/1976	12/31/9999
Brown	Kaylyn		70140656	09/27/1958	12/31/9999
Brown	Steve		09000017	02/01/1978	12/31/9999


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Notes:

Participation Overview, HRBEN0006

Employee Selection Option



In the Direct selection area, you select the employee to be processed

For direct selection of an employee:

1. Type the personnel number or search for an employee using the Matchcode in the Personnel no. field.
2. Click the Select button. The employee's benefits information will display in the processing area of the screen.

General Overview of Benefit

Direct selection

Selection set

Personnel no.

ID number

Select

Pers.No.	Name
9000015	Phil Brady
9000017	Steve Brown
70139793	Libby Casteel
70141208	Roderic Sanforth
98221018	Perry C White

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Notes:


The transactions for individual employees processing in the Benefits module enable you to select employees for processing and perform your processing tasks on a single screen. You initially select employees for inclusion in the employee list, which is displayed throughout processing. From this list, you then select and process individuals.

In the selection area, you select the employees that you want to process. The selection technique that you use depends on whether you want to select individual employees or groups of employees.

To select individual employees, enter the employee's personnel number on the *Direct selection* tab and choose the Choose/Select button. You can also type "=n.lastname" in the personnel number field and choose the Choose/Select button (example: =n.brady).

Participation Overview, HRBEN0006

Employee Selection Option



In the *Selection set* tab, you select a group of employees by choosing one or more of these criteria:

General Overview of Benefit

Direct selection

Selection set

Benefit area

State of NC

1st ProGrp.

Full Benefits Elg

2nd ProGrp.

Reg State Employees

on

06/18/2008

Add

Replace

Pers.No.

Name

80000001

Kitty Mcalister

80000002

Lindsay Cintron

80000003

Kevin Lindsey

80000004

Brandon Berg

• Benefits area

• 1st Programming Group

• 2nd Programming Group

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Notes:

To select a group of employees, enter groupings on the *Selection* tab. Click the **Choose/Add** button to add employees to your selection to the employee list or click the **Replace** button to replace the contents of an existing list with your selection.

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Participation Overview, HRBEN0006

General Overview of Benefit Plan Data

Direct selection

Selection set

Personnel no.

ID number

Select

Pers.No.

Name

80001035

Marvin Tillman

80001036

Jean Leach

80001037

Ervin Santiago

80001038

Peter Whitley

800

800

800

Display

Name

Jean Leach

on

06/18/2008

Display

Plans

Costs

Master Data

Overview

Display

Change

Confirmation Form

Error List

Plan Attributes

Plan Details

Further De

NC Flex Cancer Insurance

02/01/2008 - 12/31/9999

NC Flex Dental Plan

06/01/2008 - 12/31/9999

PPO - Smart Choice Plans

06/01/2008 - 12/31/9999

NC Flex Vision Plan

02/01/2008 - 12/31/9999

NC Flex AD&D Insurance

02/01/2008 - 12/31/9999

NC Flex Life Insurance

06/01/2008 - 12/31/9999

NC Flex Dependent Care FSA

06/01/2008 - 12/31/9999

NC Flex Health Care FSA

02/01/2008 - 12/31/9999

Transaction Purpose

Use the Participation Overview transaction to display a summary list of all the benefit plans in which an individual employee is enrolled. From the General Overview of Benefit Plan Data screen, you can select (or highlight) a plan and then display the employee information for the plan.


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Notes:

Once an employee has been selected, a series of tab pages become active, showing the different categories of information. The Plans tab is the default page.


Helpful tip: When you double click on the plan name, the infotype record displays. We will learn about benefits infotypes in the next lesson. In the meantime refer to the Benefits Infotype Quick Reference located in the back of your Student Guide. This document is also available on the BEACON University web site.



2.1 - Demonstration

- Display Participation Overview - HRBEN0006
 - Perform this transaction to display the benefits master data for an employee.
- Information
 - Employee: Marvin Tillman

To access BEACON Help, select the **Help > BEACON Help** menu option from any SAP ERP screen.



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Notes:

Watch as your instructor demonstrates how to display an employee's benefits information, by plan, using the Participation Overview, **HRBEN0006** SAP transaction.

NOTE: BEACON Help can be accessed from any SAP screen. The online help provides step-by-step procedures by screen. It also includes links to complete step-by-step procedures that you can print and it includes links to simulations.

Displaying General Plan Information

General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no.

ID number

Select

Pers No. Name

80001036	Marvin Tillman
80001038	Jean Leach
80001037	Ervin Santiago
80001038	Peter Whitley
80001039	Jay Lee
80001040	Steven Lewis
80001041	Thomas Mcgregor

Display Name Jean Leach on 06/18/2008

Plans Costs Master Data Overview

Display Change Confirmation Form Error List

Plan Attributes	Plan Details	Further De
NC Flex Cancer Insurance	02/01/2008 - 12/31/9999	
NC Flex Dental Plan	06/01/2008 - 12/31/9999	
PPO - Smart Choice Plans	06/01/2008 - 12/31/9999	
NC Flex Vision Plan	02/01/2008 - 12/31/9999	
NC Flex AD&D Insurance	02/01/2008 - 12/31/9999	
NC Flex Life Insurance	06/01/2008 - 12/31/9999	
NC Flex Dependent Care FSA	06/01/2008 - 12/31/9999	
NC Flex Health Care FSA	06/01/2008 - 12/31/9999	

Expand All

Collapse All

The Plans tab list all plans for the employee.

Display Name Marvin Tillman on 06/18/2008

Plans Costs Master Data Overview

Display Change Confirmation Form Error List

Plan Attributes	Plan Details	Further Details
NC Flex Cancer Insurance	02/01/2008 - 12/31/9999	
Option	Cancer High Option	
Dependent coverage	Employee Only	
EE pre-tax	USD 15.68 Monthly	
NC Flex Dental Plan	03/01/2008 - 12/31/9999	
PPO - Smart Choice Plans	02/01/2008 - 12/31/9999	
NC Flex Vision Plan	02/01/2008 - 12/31/9999	
NC Flex AD&D Insurance	02/01/2008 - 12/31/9999	
NC Flex Life Insurance	02/01/2008 - 12/31/9999	
NC Flex Dependent Care FSA	03/01/2008 - 12/31/9999	
NC Flex Health Care FSA	03/01/2008 - 12/31/9999	

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Notes:

To display general plan information for the selected employee, click on the right-facing arrow next to the plan name or click the Expand All button to display general plan information for all plans.

NOTE: If you double click on the Plan Title line, it will display details in the infotype view. You will learn more about infotypes in the next lesson.


Participation Overview, HRBEN0006

Costs Tab



The Costs tab displays the costs for the employer and employee

Display




Name Marvin Tillman on 06/18/2008 


Plans


Costs

Master Data

Overview



Period Monthly 

 Error List

Costs / Contributions Overview	Employee costs	Employer costs
▷ Cost overview (ER credits)	91.40 USD	0.00 USD
▷ Cost overview (ER costs)	150.66 USD	346.38 USD
▷ NC Flex Dependent Care FSA		
▷ NC Flex Health Care FSA		

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Notes:

Participation Overview, HRBEN0006

Master Data Tab

The Master Data tab summarizes employee data from these infotypes:

- Personal Data (0002)
- General Benefits Information (0171)
- Organizational Assignment (0001)
- Family Members/Dependents (0021)

Display

Name Marvin Tillman on 06/19/2008

Plans

Costs

Master Data

Overview

Maintain HR Master Data

Error List

Personal Data

Personnel Number 80061035 Entry Date 01/01/2008

ID 402-39-3695 Date of Birth 07/31/1975

General Benefits Information

Benefit area NC State of NC

1st Program Grouping FULL Full Benefits Elg

2nd Program Grouping B014 Reg State Employees

Organizational Data

Personnel area 4601 Cultural Resources

Personnel subarea NC01 7day Norm

Employee group A SPA Employees

Employee subgroup A1 FT N-FLSAOT Perm

Payroll area 01 NC Monthly

Family/Related Persons

Name	Dep./ben. type
Marvin Jr. Tillman	Child

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Notes:

- Organizational Assignment** – Displays an employee’s organizational structure and the personnel structure
- Personal Data** - Stores data for identifying an employee, such as name, SSN, and DOB

Participation Overview, HRBEN0006

Overview Tab

The Overview tab provides a block diagram that shows participation in plans over a period of time.

Display

Name Marvin Tillman on 06/23/2008

Plans Costs Master Data Overview

Start date 06/23/2007 End date 06/23/2009

Plan types

Cancer Plan

Dental

Medical

Vision

AD&D

Life Insurance

Retirement Plan

Dependent Care

Health Care FSA

NC Flex Cancer Insurance

NC NC Flex Dental Plan

PPO - Smart Choice Plans

NC Flex Vision Plan

NC Flex AD&D Insurance

NC Flex Life Insurance

TSERS - Retirement Plan

NC Flex Dependent Care FSA

NC NC Flex Health Care FSA

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Notes:

Observe that Marvin is a recently hired employee as of January 1, 2008. His health and NC Flex choices were eligible to begin February 1, 2008. Notice that his retirement started in January.

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This vertical line denotes that there was a change made to the employee's benefits.


In this example the EE changed coverage from EE only to EE + Family. The Hlth Pln PrePd is for the pre-paid premium for the “new” coverage level. The Hlth Pln Refund is the refund of the prepaid premium for the “old” coverage level.

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2.2 - Exercise

- Display Participation Overview – **HRBEN0006**
 - Jean Leach has had some life change events and needs to know her current benefits status. She would like for you to review all of her benefit plans. Use the **HRBEN0006** (General Overview of Benefit Plan Data) transaction to view the overall benefits picture.
- Instructions:
 - Log on to SAP using the steps provided by the instructor.
 - Use the Participation Overview, **HRBEN0006** (General Overview of Benefit Plan Data) transaction to view all of the benefits listed for Jean Leach. Practice using the Direct selection tab to view a program group.





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Work Instruction: Participation Overview, **HRBEN0006**

Data:

Personnel number – 80001036

Questions/Results:

1. How many dependents does Jean have?
2. What is Jean's pre-tax contribution in the:
 - NCFlex Health Care FSA plan
 - NCFlex Dependent Care FSA plan
3. Which tab displayed this information?

Helpful Hint:

To log on to SAP in the classroom:


1. Access the SAP portal web page.
2. Enter the User ID and password that is assigned to your classroom PC.
3. Click on the Log on button.
4. Click Yes to confirm the security message displayed.
5. Click on the SAP GUI tab.
6. Click on the training client specified by your instructor.
7. Stop when you have reached the Easy Access screen.

Notes:

2.3 - Knowledge Check

Display Employee Benefit Data

- In this exercise Ervin Santiago wants a check on his benefit plans. Access his benefits information using the Participation Overview, **HRBEN0006** transaction.



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Work Instruction: Participation Overview, **HRBEN0006** Data:


Personnel number – Search for Ervin Santiago's record.

Questions/Results:

1. In which benefits plans is Ervin enrolled?
2. How many dependents does Ervin have?
3. What is the annual pre-tax contribution to the dependent care FSA?
4. In what retirement plan is Ervin enrolled?

Notes:

Lesson 2 Review



In this lesson, you learned to:

- Display information about the benefits of individual employees using the Participation Overview transaction – HRBEN0006

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Notes:

Course Map – Benefits Display Overview

Lesson 1: Benefits Process Overview

Lesson 2: Employee Participation Overview

Lesson 3: Benefits Infotypes

Lesson 4: Benefits Letters and Reporting

Lesson 5: Course Review

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Notes:

Lesson Objectives

Upon completion of this lesson, you should be able to.

- Identify benefits infotypes and subtypes
- Display individual benefit infotypes for an employee using the PA20, Displaying HR Master Data for Benefits, transaction
- Identify the reason for an adjustment



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In the previous lesson we reviewed how benefits infotypes can be accessed using the Participation Overview. The **PA20** transaction, Displaying HR Master Data for Benefits, is another method that you can use to display a specific benefit infotype. In this lesson we will use that SAP transaction to familiarize you with the information contained in some key infotypes for benefits.

Notes:

Benefits Infotypes

Infotype used for enrollment


- 0171 General Benefits Data
- 0378 Adjustment Reasons

Infotypes created by enrollment

- 0167 Health Plans
- 0168 Insurance Plans
- 0169 Savings Plans
- 0170 FSA Plans
- 0377 Miscellaneous Plans

Infotype to store dependent information

- 0021 Family Members



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Notes:

An infotype, in simple terms, is a screen that stores particular employee HR master data information. This slide lists the benefits infotypes. In this lesson we will discuss these infotypes:


- 0021 Family Members
- 0167 Health Plans
- 0171 General Benefits Data
- 0378 Adjustment Reasons

The Miscellaneous Plans infotype (0377) is used for processing SHP prepaid premium and other premium adjustments.

Other Infotypes to be Used by Benefits (Con't)

Benefits Administration will also access these infotypes:

- 0014 Recurring Payments/Deductions
- 0015 Additional Payments
- 0019 Monitoring of Task
- 0041 Date Specifications (Length of Service)
- 0552 Time Specification/Employment Period



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Notes:

Recurring Payments/Deductions (0014) -- This infotype is used for the collection of premiums for agency-specific benefits.

Additional Payments (0015) – Used to define wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined period.

Monitoring of Task (0019) – Used to create date-driven tasks that have follow-up activities. Depending on the selected task type, the system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule. Examples include the expected return date of an LOA, the date vacation will run out for an LOA, the date a foster child was added as a dependent, and the date a foster child's eligibility was proven.

Date Specifications (0041) – Stores dates that are required by the State, such as Original Hire Date, Agency Hire Date, Last Day Worked, Notification of RIF, Lottery Anniversary Date, and 457 Catch-up date


Time Specification/Employment Period (0552) – Stores additional employment or absence periods for the calculation of the employment period. It also stores months of service from PMIS at the time of SAP conversion or Non-Beacon to Beacon transfers.

Subtypes

Infotypes can contain subtypes. A subtype is a subdivision or a separate category of information existing within an infotype.

Example:

- The subtype for the Health Plans infotype are:
 - **CANC – Cancer Plan**
 - **CRIT – Critical Illness**
 - **DENT – Dental Plans**
 - **MEDI – Medical Plans**
 - **VIS – Vision Plans**



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Please note that some infotypes have subtypes. For example, the subtypes for Health Plans are cancer, critical illness, dental, medical and vision plans.

Notes:

Display Master Data (PA20)

The **PA20** SAP transaction is used to display:

- Individual infotypes within an employee's records
- An overview of the records of a specific infotype
- Specific data on a infotype



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Notes:

Display Master Data (PA20)

PA20 Initial Screen

Infotype List

Display HR Master Data

Personnel no. 80001035

Name Marvin T Tillman

EE Group A SPA Employees PersA 4601 Cultural Resources

EE Subgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOURC

Basic Personal Data Payroll **Benefits** Time Addtl. Personal Data

Infotype text E

General Benefits Information ✓

Adjustment Reasons ✓

Family Member/Dependents ✓

Health Plans ✓

Insurance Plans ✓

Savings Plans ✓

Flexible Spending Accounts ✓

Miscellaneous Plans

Monitoring of Tasks

Period

From To

Today Curr:week

All Current month

Direct selection

Infotype Health Plans STy

Denotes EE has infotype

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Notes:

The **PA20** SAP transaction is used to display:

- Individual infotypes within an employee’s records
- An overview of the records of a specific infotype
- Specific data on a infotype

The initial screen for the **PA20** SAP transaction lists the infotypes that have been established for an employee. To display a list of benefits infotypes, click the Benefits tab.

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Validity Periods

- All infotypes have a validity period which consists of a start date and end date.
- The validity period defines the effective dates of infotype records. It enables SAP to capture changes to employee information while retaining history.
- When information is current, the 'end of time' (12/31/9999) will be displayed in the field as the end date.

Coverage
Start date

Coverage
End date

Display Insurance Plans (0168)

Personnel No: 80001037

Name: Ervin Santiago

EEGroup: A SPA Employees

PersA: 4601 Cultural Resources

EESubgroup: B1 FTS-FLSAOT Perm

Statu: Active

Start: 02/01/2008 to 12/31/9999

Chng: 06/17/2008 90000044

Plan: LIFE NC Flex Life Insurance


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Notes:

3.1 - Demonstration

- Display Employee Benefit Data for Family Members / Dependents using the PA20 transaction
 - Perform this transaction to display employee master data including the Family Members / Dependents infotype.
- Information:
 - Employee: Marvin Tillman



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In a moment your instructor will demonstrate how to access the Family Members/ Dependents infotype using the **PA20** transaction. The **PA20** transaction allows you to display employee information. In general, all the current information we have about an employee in SAP can be viewed from this transaction.

The basic steps for using the **PA20** transaction are:

1. From the Easy Access screen, click in the **Command field** and type **PA20**.
2. Click the **Enter** button. The *Display HR Master Data* screen displays.
3. Type or select the employee's personnel number in the **Personnel no.** field.
4. Type **0021**, for Family Member, in the Infotype field. Keep in mind that only those infotypes that have a green check contain data.
5. Click either the **Display** (F7) button or **Overview** (Shift + F8). The employee's master data for the specified infotype displays. Display shows each dependent record. Overview allows you to select the dependent to view.

Notes:

Family Member/Dependents (Infotype 0021)

Click the Overview button to display Dependent details

Infotype Edit Goto Extras System Help

Overview Family Member/Dependents (0021)

Personnel No 80001035 Name Marvin Tillman

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Choose 01/01/1800 to 12/31/9999 STy

T	Last name	First name	G	Birth dt
1	Tillman	Cynthia	F	11/02/1966
2	Tillman	Marvin Jr	M	01/25/2008
2	Tillman	Charles	M	05/12/1988
2	Tillman	Tiffany	F	08/15/2003

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Notes:

This screen is the result of clicking the Overview button on the Display HR Master Data screen for the Family Member/Dependent infotype (0021).

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Dependent Record

A Family Member/Dependent record must exist before employees can include family and related persons as dependents and beneficiaries on their benefit plans

Display Family Member/Dependents (0021)

Personnel No: 80001035Name: Marvin Tillman

EE Group: A SPA EmployeesPersA: 4601 Cultural Resources

EESubgroup: K1 FT N-FLSAOT PermStatus: Active

Start: 05/01/2008To: 12/31/9999Chng: 06/19/2008 90000044

Member: 1 Spouse

Personal data

Last name: TillmanBirth name:

First name: CynthiaInitials:

Title:

Gender: ☒ Female ☐ Male

Birth date: 11/02/1966Ref.Pers.No:

SSN: 554-69-8751Telephone number: 0

Street:

Addr Line 2:

City/State:

Zip/country:

Separation Date:

Marital status:

Challenge

☐ Disability

Disability Date:

Learned:

Status

☐ Student Indicator

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The Status and Challenge indicators are relevant to dependent children over:

- 19 years old and who are full-time students.
- 26 years old who are medically disabled.


When these indicators are checked, the system allows the dependent to continue to be eligible for health plans.

Notes:

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Infotype 0021 – Family Members



SAP stores information about family members or related persons including:

Subtype #	Name
1	Spouse
2	Child
3	Legal dependent
6	Stepchild
10	Divorced spouse
15	Foster child
91	Court ordered dependent

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Notes:


There are seven entries for the subtype for this infotype including spouse, child, legal dependent, stepchild, divorced spouse, foster child, and court ordered dependent. These family members are available as dependents.

This infotype is also used to establish beneficiary information in other subtypes:

- 8 Related persons
- 11 Father
- 12 Mother
- 16 Other

3.2 - Exercise

- Display Employee Benefit Data for Family Members/Dependents - PA20
 - For this exercise, Jean Leach wants you to verify that all of her dependents are in SAP. Access her Master Data record using the **PA20** transaction and then use infotype 0021 (Family Member/Dependants) to determine the names of the dependents listed for Jean on her various plans.
- Instructions
 - Use the data in the business scenario above to display Jean's master data structure
 - Answer the questions below after locating the vacant position
- Practice using the:
 -  **Overview** button on the *Display HR Master Data* screen
 -  **Next record** screen button on the *Display Family Member/Dependents* screen. (This button is available on the Display Family Members/Dependents screen.)



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Notes:

Work Instruction: Displaying HR Master Data for Benefits, transaction code, **PA20**

Data:


Employee Name – Jean Leach

Question/Result:

1. How many dependents does Jean have?

3.3 - Demonstration

- Display Employee Benefit Data Health Plans - PA20
 - Perform this transaction to display employee master data including the Health Plans infotype.
- Information
 - Employee: Marvin Tillman



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Notes:

Watch your instructor demonstrate how to access transaction code **PA20** to display master data, specifically the Health Plan infotype IT 0167.

The **PA20** transaction allows you to display employee information. In general, all the current information available for an employee in SAP can be viewed from this transaction.

Health Plans (Infotype 0167) Overview

Usually changes will not be made to this infotype. It is automatically created and updated by enrollment procedures.

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Notes:

This infotype stores details of the health plans in which the employee is enrolled. For each health plan in which the employee participants, a separate record exits.

The following four subtypes have been defined:

- CANC – Cancer
- CRIT – Critical Illness
- DENT – Dental
- MEDI – Medical
- VIS – Vision

Health Plans (Infotype 0167)
Plan Data Tab



The *Plan data* tab shows how the plan fits into your benefit structure. It stores the cost rule variant for the plan.

Display Health Plans (0167)

Personnel No: 00001035

Name: Marvin Tillman

EEGroup: A SPA Employees

PersA: 4601 Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm

Statu: Active

Start: 02/01/2008 to: 12/31/9999

Chng: 06/17/2008 90000044

Plan: CANC NC Flex Cancer Insurance

Plan dataAdministrationCostsDependentsAdditional data

General plan data

Benefit area: NC State of NC

Plan type: CANC Cancer Plan

Benefit plan: CANC NC Flex Cancer Insurance

Health Plan Option: CH16 Cancer High Option

Dependent Coverage: EE Employee Only

Planning Parameters

Cost Rule Variant: CHEE Cancer High Opt EE Only Cost

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Notes:

Once an infotype has been selected, a series of tab pages will become active, showing the different categories of information. The Plan data tab is the default page.

The *Additional data* is not being used by OSC HR/Payroll.

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Health Plans (Infotype 0167) Administration Tab



The *Administration* tab is created by SAP at enrollment. It shows the status of evidence of insurability requirements for a health plan. Only Cancer and Life Insurance requires evidence of insurability.

Infotype Edit Goto Extras System Help

Display Health Plans (0167)

Object manager scenario: EMPLOYEE

Person

Collective search help

Search Term

Free search

Personnel No: 80001835

Name: Marvin T. Tilton

EEGroup: SPA Employees

PersA: 4681 Cultural Resources

EESubgroup: FT N-FLSAOT Perm

Status: Active

Start: 02/01/2008 to 12/31/9999

Chng: 05/17/2008 90000044

Plan: CANC NC Flex Cancer Insurance

Plan data

Administration

Costs

Dependents

Additional data

Participation data

Eligible on: 02/01/2008

Elig. override:

Participation date: 02/01/2008

Type of enrollment: Using an adjustment reason

Adjustment reason: New Hire

Evidence of insurability

Statement Required

End of Grace Period:

Insurability Proven

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Notes:

Health Plans (Infotype 0167) Costs Tab

The *Costs* tab shows the automatically generated employer and employee plan costs.

This slide depicts a monthly payroll status.

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Notes:

This slide illustrates an employee on a monthly pay cycle. The deductions shown are the monthly premium amounts.

For employees assigned to the bi-weekly pay period, as denoted in the Payroll Status field, the cost displayed by SAP is calculated on 26 bi-weekly pay periods per year. The State’s actual calculation of cost is based on 24 bi-weekly pay periods per year. In other words, this tab does not display the actual costs being deducted.

Calculation date information and the Deductions Pre-Tax checkbox can be found on the left-hand side of the screen.

Health Plans (Infotype 0167)
Dependents Tab



The *Dependent* tab lists the possible dependents for the plan. The dependents chosen by the employee are marked here in the Select indicator.

Display Health Plans (0167)

Personnel No: 00001035Name: Marvin Tillman

EEGroup: A SPA EmployeesPersA: 4601 Cultural Resources

EESubgroup: A1 FT N-FLSAOT PermStatu: Active

Start: 02/01/2008 to: 12/31/9999Chng: 06/17/2008 90000044

Plan: CANC NC Flex Cancer Insurance

Plan dataAdministrationCostsDependentsAdditional data

Select	Name	Type of dependen	ID number	Birth date
<input type="checkbox"/>	Marvin Jr Tillman	Child	556-49-7785	01/25/2008

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The Additional data tab is not being used by OSC HR/Payroll.


Notes:

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3.4 - Exercise

- Display Employee Benefit Data for Health Plans - PA20
 - For this exercise, Jean Leach wants a status check on her health benefit plans. Access her Master Data record using the **PA20** transaction. Use infotype 0167 (Health Plans) to determine which health plans Jean has.
- Instructions
 1. Use the data in the business scenario above to display Jean's master data structure.
 2. Answer the questions below after locating the master data record.



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Work Instruction: Displaying HR Master Data for Benefits, transaction code **PA20**

Data:

Employee – Jean Leach

Questions/Results:

1. How many health plans does Jean have?
2. How did you determine your results?
3. Does Jean have the Vision plan?
4. What is Jean's month premium for the PPO?
5. Which tab page did you view to determine your result?

Notes:



Display Insurance Plans (Infotype 0168)

The Plan data tab of the Display Insurance Plans infotype displays whether the plan is Core Accidental Death & Dismemberment (AD&D), Voluntary Accidental Death & Dismemberment or Life Insurance plan.

In this example a Life plan is displayed.

Display Insurance Plans (0168)

Personnel No:	80001037	Name	Ervin Santiago
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	B1 FT S-FLSAOT Perm	Statu	Active
Start	02/01/2008	to	12/31/9999
Chng	06/17/2008		90000044

Plan L1FE NC Flex Life Insurance

Plan data Administration Insurance cov. Costs Beneficiaries

General plan data

Benefit area	NC State of NC
Plan type	L1FE Life Insurance
Benefit plan	L1FE NC Flex Life Insurance
Insurance Option	L1FE NC Flex Life Insurance

Planning Parameters

Coverage Variant	L1FE NC Flex Life Ins
Cost Rule Variant	L1FE NC Flex Life Cost

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Notes:

Determining Evidence of Insurability

To determine EOI:

- Enter a personnel number
- Select the Insurance Plans infotype

Personnel No91100001NameJOHN SANDERSON

EEGroupA SPA EmployeesPersA1601 Environment Natural Resources

EESubgroupA1 FT N-FLSAOT PermStatuActive

Start7/07/2008to12/31/9999Chng7/07/2008ZSAPESS02

PlanLIFE NC Flex Life Insurance

Plan dataAdministrationInsurance covCostsBeneficiaries

Participation data

Eligible on08/01/2008

Elig. override

Participation date

Type of enrollmentUsing an adjustment reason

Adjustment reasonMarriage

Evidence of insurability

☒ Statement Required

☐ Insurability Proven

End of Grace Period9/07/2008

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Notes:

The Administration tab is crucial because it contains Evidence of Insurability (EOI) information:

- The Statement Required checkbox denotes whether or not the employee must prove their health status to the vendor of the insurance. If the Statement Required checkbox is selected the record is locked.
- The Insurability Proven checkbox denotes whether EOI has been proven.
- End of Grace Period
 - This is the 60-day period by which the EOI should be proven.

Display Insurance Plans (Infotype 0168)
Insurance cov. tab



The Insurance cov. Tab displays the coverage amount.

Display Insurance Plans (0168)

Personnel No: 00001037Name: Ervin Santiago

EEGroup: A SPA EmployeesPersA: 4601 Cultural Resources

EESubgroup: B1 FT S-FLSAOT PermStatu: Active

Start: 02/01/2008 to: 12/31/9999 Chng: 06/17/2008 90000044

Plan: LIFE NC Flex Life Insurance

Plan dataAdministrationInsurance cov.CostsBeneficiaries

Annual base salary

Benefit salary34,255.00 USD

Calculation Date06/19/2008

Salary override0.00

Insurance coverage

Basic Coverage Amt20,000.00 USD

Additional Units5 X 10,000.00 USD

Insurance Coverage70,000.00 USD

Alternative Coverage0.00

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Notes:

The Insurance Coverage field displays the total coverage amount. If an amount is listed in the Alternative Coverage, this is the amount of insurance upon which the employee's premium is based. This Alternative Amount occurs when a Life Insurance plan is pending for EOI approval.

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Display Insurance Plans (Infotype 0168)
Costs tab



The Costs tab displays the costs paid by the employee and the employer. Although the values are not necessarily what is deducted.

Display Insurance Plans (0168)

Personnel No: 80001037Name: Ervin Santiago

EEGroup: A SPA EmployeesPersA: 4601 Cultural Resources

EESubgroup: B1 FT S-FLSAOT PermStatus: Active

Start: 02/01/2008to: 12/31/9999Chng: 06/17/2008 90000044

Plan: LIFE NC Flex Life Insurance

Plan dataAdministrationInsurance covCostsBeneficiaries

Calculated costs

Period: 1 Monthly

Employee costs: 6.79 USD

Employer credit: 0.00 USD

Provider Cost: 6.79 USD

Calculation Date: 06/19/2008

☒ Deductions Pre-Tax

☐ Credits Allowed

Individual employee costs

Period: 1 Monthly

Alternative Cost Amt: 0.00

Costs for Bonus: 0.00

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Notes:

The Admin and Beneficiary tabs are not shown. The types of data displayed are the same as Infotype 0167 (Health Plans).

The example above is displayed for a monthly employee. For biweekly employees, the State’s actual calculation of cost is based on 24 bi-weekly pay periods per year. In other words, the cost tab does not display the actual costs and should only be used as general information. The actual costs is calculated through the payroll process.


The Admin tab displays:

- Eligible on date
- Participation date
- Type of enrollment
- Adjustment reason

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Display Insurance Plans (Infotype 0168)
Beneficiaries tab



Employees can perform changes to Beneficiaries after enrollment in ESS.

Display Insurance Plans (0168)

Personnel No: 80001037Name: Ervin Santiago

EEGroup: A SPA EmployeesPersA: 4601 Cultural Resources

EESubgroup: B1 FT S-FLSAOT PermStatus: Active

Start: 02/01/2008to: 12/31/9999Chng: 06/19/2008 90000044

Plan: LIFE NC Flex Life Insurance

Plan dataAdministrationInsurance covCostsBeneficiaries

Pcnt	Beneficiary name	Type of dependen	ID number	Birth date	Co
50	Caleb Santiago	Child	112-44-5568	06/07/2001	<input type="checkbox"/>
50	Conner Santiago	Child	556-44-8875	06/07/1997	<input type="checkbox"/>

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Notes:

The Benefits tab displays:

- Name of the Beneficiary
- Type of Beneficiary

The Start date may not be the original coverage start date, if the date is something other than the first of the month, check the Administration tab to see if the last change made was a Beneficiary Change.


NOTE: Beneficiary information is only listed if the employee completed the beneficiary change by ESS. If the employee completes the beneficiary changes by a form, the form is sent to the vendor and not entered in OSC HR/Payroll.

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3.5 - Exercise

- Display Employee Benefit Data for Insurance Plans using the PA20 transaction
 - For this exercise, Jean Leach wants a status check on her insurance plans. Access her Master Data record using the **PA20** transaction. Use infotype 0168 (Insurance Plans) to determine which insurance plans Jean has.
- Instructions
 1. Use the data in the business scenario above to display Jean's master data structure.
 2. Use infotype 0168 (Insurance Plans) with the Overview option to determine her various insurance plans.
 3. Answer the questions below after locating the master data record.



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Work Instruction: Displaying HR Master Data for Benefits, transaction code **PA20**

Data:

Employee name – Jean Leach

Questions/Results:

1. How many insurance plans does Jean have?
2. How did you determine your results?

Notes:

General Benefits Data - (Infotype 0171)



This record is essential for benefits processing. An employee must have a General Benefits Information record before enrolling in a benefits plan.

Display General Benefits Information (0171)

Personnel No: 80001036

Name: Jean Leach

EEGroup: A SPA Employees

PersA: 4601 Cultural Resources

EESubgroup: A1 FTN-FLSAOT Perm

Statu: Active

Start: 01/01/2008 to 12/31/9999


Chng: 06/17/2008 ECATT

General Benefits Information

Benefit area	NC	State of NC
1st Program Grouping	FULL	Full Benefits Elg
2nd Program Grouping	B014	Reg State Employees

Notes:

Miscellaneous Plans (Infotype 0377)



The Miscellaneous Plans infotype is created automatically when an employee enrolls in a SHP (State Health Plan) as the mechanism to collect the prepaid premium for the first enrollment month

Display Miscellaneous Plans (0377)

Personnel No: 80001036Name: Jean Leach

EEGroup: A SPA EmployeesPersA: 4601 Cultural Resources

EESubgroup: A1 ET N FLAOT PermStatu: Active

Start: 06/20/2008 to 07/23/2008 Chng: 07/24/2008 SAPTRN035

Plan: CMP1 Indemnity PrePaid Plan

Plan dataAdministrationCosts/credits

General plan data

Benefit area: NC State of NC

Plan type: MED Hlth Pln PrePd

Benefit plan: CMP1 Indemnity PrePaid Plan

Option miscel. plan: CST1 CMMP PrePaid EE Only

Planning Parameters

Cost Rule Variant: CST1 CMMP EE ONLY

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Notes:

The Miscellaneous Plans infotype is created automatically when an employee enrolls in a SHP (State Health Plan) as the mechanism to collect the prepaid premium for the first enrollment month. For example, if an employee is hired 6/19/09 and has selected to start the SHP plan on 8/01/09, then the validity dates for this infotype will be 7/01/09 to 07/31/09 to collect the prepaid premium for the first month of enrollment in the plan. Subsequent premiums will be automatically occur as a payroll deduction. This infotype is automatically created through a nightly batch processing job based on that day's enrollment.

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Work Contract field (Infotype 0001)

The following data relating to the employee is displayed in the Work Contract field:

- Short-term disability years of service eligibility
- Medicare eligibility
- Retiree rehire earning limitations

Display Organizational Assignment (0001)

Org Structure

Personnel No: 80001036

Name: Jean Leach

EEGroup: A SPA Employees

PersA: 4601 Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm

Status: Active

Start: 01/01/2008

to: 12/31/9999

Chng: 06/18/2008 90000044

Enterprise structure

CoCode: NC01 STATE OF NC

Pers.area: 4601 Cultural Resources

Subarea: NC01 7day Norm

Cost Ctr: 4699999999

CULTURE RESOUR

Bus. Area: 4600 Cultural Resources

Fund: 469999999

CULTURE- SUSPEI

Func. Area: 6000000000000001

Personnel structure

EE group: A SPA Employees

Payr.area: 01 NC Monthly

EE subgroup: A1 FT N-FLSAOT Perm

Contract: M1 MedCare EE Elig

Organizational plan

Percentage: 100.00

Position: 60083606 206000002564

Job key: 30001542

Historic Sites Specialist

His St S Spl

Org. Unit: 20010226 48020602564

Historic Sites Specialist

CR CDS A&H HIS SITE:

Org.key: 46014699999999

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To view the Work Contract field you can:

- Select the Organizational Assignment infotype (0001).
- Open the drop-down (match code) to view possible entries.
- In this example the employee is eligible for the State Medicare Health Plan rate.

The agency STD Administrator or BEST Shared Services populates the work contract field for one of several events:

- Short-term Disability (STD) yrs of service eligibility
 - This automatically changes the deduction amount to Employee Full Pay if changed to SHP-STD<5 RTMT.
- The code SHP-STD<5 RTMT is also used for employees who are not eligible for their health insurance premiums to be paid by the state during their LOA.
- Medicare Eligibility
 - BEST Shared Services uses Medicare codes to adjust an employees deduction, so that SHP Medicare rates are applied.
- Retiree rehire earning limitations


STD & Medicare eligibility enables the system to collect the correct premium amount for health insurance as well as controlling the cost of SHP.

Retiree rehire earning limitations are used to report to ORBIT employees subject to earning limitations.

Notes:

How Adjustment Reasons are Created

- For qualifying events such as new hire that require the HR administrator to perform a personnel action, SAP automatically generates the appropriate adjustment reason infotype.
- For life qualifying events that do not require a personnel action to be performed, the HR administrator creates the adjustment reason infotype using transaction code **PA30**.
- All other adjustment reasons are created by BEST Shared Services.
- Job Aids available by clicking “Help” on the Beacon Portal home page.
 - How to Create Adjustment Reasons
 - Adjustment Reasons




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An adjustment reason infotype record is required before a change in an employee's benefits can occur. The execution of personnel actions that affect an employee's benefits will automatically create the appropriate adjustment reason with the correct enrollment date. For qualifying events that do not require a personnel action, such as additions or deletions of dependents, the HR administrator must create the adjustment reason.

Notes:

Adjustment Reasons (Infotype 0378)
Overview Adjustment Reasons Screen



Overview Adjustment Reasons (0378)

Personnel No80001036NameJean Leach

EEGroupASPA EmployeesPersA4601Cultural Resources

EESubgroupA1FT N-FLSAOT PermStatuActive

Choose

01/01/1800to12/31/9999

STy.

Validity period

Start Date	End Date	BenArea	Adj.reason	Text	Lock
01/01/2008	01/31/2008	NC	HIRE	New Hire	
05/01/2008	05/31/2008	NC	NCHD	Add Foster/StepChild	

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Notes:

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3.6 - Exercise

- Display Employee Benefit Data Adjustment Reasons - PA20
 - Perform this transaction to display the adjustment reasons in an employee's record.
- Information
 - Employee: Marvin Tillman



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Work Instruction: Displaying Employee Benefit Data Adjustment Reasons, transaction code **PA20**

Data:

Employee name – Marvin Tillman


Notes:

3.7 – Knowledge Check

- Display the Employee Benefit Data for an Employee
 - Display infotype 0170 (Flexible Spending Account)
 - Display infotype 0169 (Savings Plan)
 - Display infotype 0377 (Miscellaneous Plans)
 - Display the Contract field using infotype 0001
- Information:
 - Employee: Peter Whitley

Instructions:

1. Use the data in the business scenario above to display spouse and dependant information.
2. Change infotypes 0021 as required.
3. Answer the questions below after locating the master data record.



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Work Instruction: Displaying HR Master Data for Benefits, transaction code **PA20**

Data:

Employee name – Peter Whitley

Questions/Results:

1. What type of Flexible Spending Account does Peter have?
2. What is Peter's monthly contribution towards his Savings Plan?
3. Is Peter enrolled in any Miscellaneous Plans?
If so, what type of plan?
4. What did you learn about Peter's benefits status after viewing the Contract field?

Notes:

Lesson 3 Review



In this lesson, you learned to:

- Identify benefits infotypes and subtypes
- Display individual benefit infotypes for an employee using the PA20, Displaying HR Master Data for Benefits, transaction
- Identify the reason for an adjustment

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Notes:

Course Map – Benefits Display Overview


Lesson 1: Benefits Process Overview

Lesson 2: Employee Participation Overview

Lesson 3: Benefits Infotypes

Lesson 4: Benefit Letters and Reporting

Lesson 5: Course Review



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Notes:

Lesson Objectives

Upon completion of this lesson, you should be able:

- Print benefits confirmation forms
- Print benefits letters




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Notes:

Print Confirmation Form, HRBEN0015



- Transaction Overview
- Purpose - Use this transaction to print a confirmation form at any time.
- Features
 - You can select multiple employees by using the Multiple Selection for Personnel Number dialog box.
 - You can preview or display the form
 - You can specify a date range



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Notes:

STATE OF NORTH CAROLINA

1425 MAIL SERVICE CENTER

RALEIGH, NC 27699-1425

DEACON

North Carolina

Office of the State Controller

Ervin Santiago

886 Lbac Lane

Jessup, NC 27649

Personnel No. 80001037

Personnel Area Cultural Resources

Payout Area NC Monthly

DATE 06/16/2008

Listed below are your most recent elections and costs. Please review the information carefully to confirm your enrollment in these benefit plans. Changes to your plans can only be made if your eligibility changes due to a qualifying event or you make changes during open enrollment. If you have any questions about the information you see below, please contact the Benefits Support Center at 1-866-NCBEST-4U.

HEALTH PLANS

NC Flex Cancer Insurance

Option

EE Pre-tax

02/01/2008 - 12/31/9999

Cancer High Option

15.68 USD

NC Flex Dental Plan

Option

EE Pre-tax

02/01/2008 - 12/31/9999

Dental High Option

80.92 USD

Dependents in period

02/01/2008 - 12/31/9999

Caleb Santiago

Conner Santiago

Child

Child

Date of Birth

Date of Birth

06/07/2001

06/07/1997

PP0 - Smart Choice Plans

Option

EE Pre-tax

Employer Cost

02/01/2008 - 12/31/9999

Smart Choice Basic 70/30

150.66 USD

346.38 USD

Dependents in period

02/01/2008 - 12/31/9999

Caleb Santiago

Conner Santiago

Child

Child

Date of Birth

Date of Birth

06/07/2001

06/07/1997

INSURANCE PLANS

NC Flex Life Insurance

Option

02/01/2008 - 12/31/9999

NC Flex Life Insurance

75.00000 USD

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Notes:

The plans in which an employee is participating on the selection date are listed in the form.

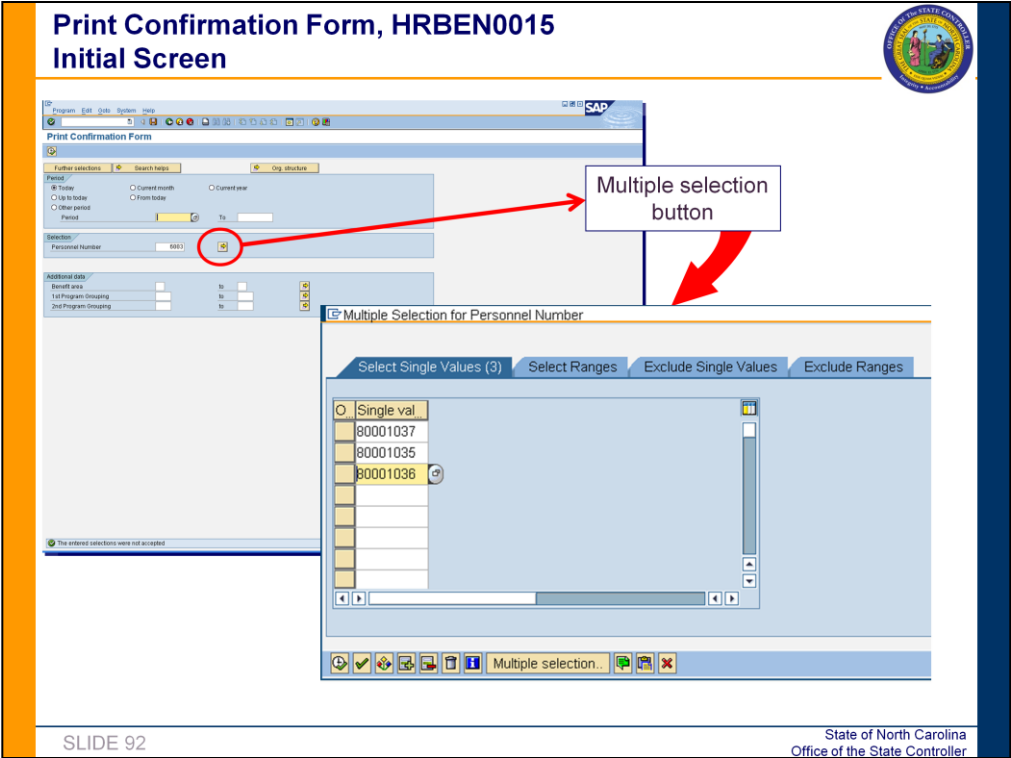
03/09/10

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If you want to	Then
Print or display confirmations for current date,	select the Today radio button.
Print or display confirmations from the beginning date to the end date of the current month,	select the <i>Current Month</i> radio button.
Print or display confirmations from 01/01 to 12/31 of the current year	select the <i>Current year</i> radio button.
Print or display confirmations up to today,	select the <i>Up to today</i> radio button.
Print or display confirmations from today through 12/31/9999,	select the <i>From today</i> radio button.
Enter a date range to print or display confirmations,	select the <i>Other period</i> radio button and enter the begin date in the <i>period</i> field and the end date in the <i>to</i> field.

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Notes:



Notes:

You can type or search for personnel numbers in the Single Values column. Click the Copy button to transfer your selections to the initial screen. (**NOTE:** Only the first personnel number will be displayed on the screen.)

Once you click the Execute button, the Print Confirmation Form screen displays listing the selected employees as shown in the following screen image:

Print Confirmation Form		
<div>Print form Display form Overview Error List</div>		
Print confirmation form on 01/01/2008 - 12/31/2008		Status Description
▼ NC State of NC		
<input type="checkbox"/>	80000001	Kitty Mcalister
<input type="checkbox"/>	80000002	Lindsay Cintron
<input type="checkbox"/>	80000003	Kevin Lindsey
<input type="checkbox"/>	80000004	Brandon Berg
<input type="checkbox"/>	80000005	Gertrude Bradley
<input type="checkbox"/>	80000006	Melissa Martin
<input type="checkbox"/>	80000007	William Bishop
<input type="checkbox"/>	80000008	Robert Swift
<input type="checkbox"/>	80000009	Debbra Williams
<input type="checkbox"/>	80000010	Brett Walsh
<input type="checkbox"/>	80000016	David Bolton
<input type="checkbox"/>	80000017	Ruth Parker
<input type="checkbox"/>	80000018	Viola Voigt

Print Confirmation Form, HRBEN0015

Org Structure Feature

Print Confirmation Form

Further selections

Search helps

Org. structure

Period

Today

Current month

Current year

Up to today

From today

Other period

Period

Selection

Personnel Number

Additional data

Benefit area

1st Program Grouping

2nd Program Grouping

Choose Organizational unit

Name	ID	Code
<input type="checkbox"/> CR Cabinet Secretary	O 20000025	48010101001
<input type="checkbox"/> CR CABSEC Chief Deputy Secretary	O 20010124	48010101005
<input type="checkbox"/> CR CDS Archives & History Office	O 20010134	48020102001
<input type="checkbox"/> CR CDS A&H Historical Resourc	O 20010135	48020102005
<input type="checkbox"/> CR CDS A&H Programs	O 20010136	48020102031
<input type="checkbox"/> CR CDS A&H Historic Sites Divis	O 20010174	48020422305
<input type="checkbox"/> CR CDS A&H Museum of History	O 20010321	48080102750
<input type="checkbox"/> CR CDS A&H MOH NC MARIT	O 20010237	48021002890
<input type="checkbox"/> CR CDS A&H MOH Design S-	O 20010310	48080102695
<input type="checkbox"/> CR CDS A&H MOH Internal O	O 20010315	48080102739
<input type="checkbox"/> CR CDS A&H MOH Commun	O 20010324	48080102757
<input type="checkbox"/> CR CDS A&H MOH Curation	O 20010325	48080102768
<input type="checkbox"/> CR CDS A&H MOH Director A	O 20010328	48080102777
<input type="checkbox"/> CR CDS A&H MOH Museum	O 20010330	48080202800
<input checked="" type="checkbox"/> CR CDS A&H MOH Mountain	O 20010336	48080302821
<input type="checkbox"/> CR CDS A&H MOH Museum	O 20010337	48080402835
<input type="checkbox"/> Crime Control & Public Safety	O 20000047	490000000000
<input type="checkbox"/> State Budget & Management	O 20000048	300000000000
<input type="checkbox"/> State Controller	O 20000049	500000000000
<input type="checkbox"/> Information Technology	O 20000050	510000000000
<input type="checkbox"/> Community Colleges	O 20000051	680000000000

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Notes:

You can also mass print forms for an entire org unit by choosing the Org Structure button on the upper right side of the form selection area.

Click on the Org Structure button. The Choose Organizational Unit pop-up box is displayed. Open the tree down to the level you wish to print. Click the check box in front of the org unit and click the green check mark to “load” the data to print.


Continue entering the necessary data on the HRBEN0015 screen. Click on the Execute icon. The list of persons from the org unit is displayed. You can select all or as many as you desire for whom to print forms.

Remember, you can only print forms for the those persons for whom you are authorized to view.

4.1 - Walkthrough

- Print Confirmation Form – **HRBEN0015**
 - In this exercise, Jean Leach needs a printed confirmation form detailing her benefit selections for her financial planner. She does not have access to ESS so she needs you to print the benefits overview for her.
- Instructions
 - Use the **HRBEN0015** (Print Confirmation Form) transaction to display a copy of her plan.

Important: The training classroom is not set up to print, so for this exercise, select the display form option instead of the print option.



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Work Instruction: Print Confirmation Statement, transaction code **HRBEN0015**

Data:

Personnel number – 80001036

Questions/Results:


1. After you have “printed” Jean’s confirmation form, return back to the Print Confirmation Form screen and select one of her children. Then click the Overview button.
2. What screen is now displayed?
3. Which of the previous SAP transactions that we have covered also allows you to print a confirmation form?

Notes:

4.2 - Walkthrough

- Print Confirmation Form – **HRBEN0006**
 - In this exercise, Jean Leach needs a printed confirmation form detailing her benefit selections for her financial planner. She does not have access to ESS so she needs you to print the benefits overview for her.
- Instructions
 - Use the **HRBEN0006** (Participation Overview) transaction to display a copy of her plan.

Important: The training classroom is not set up to print, so for this exercise, select the display form option instead of the print option.



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Data:

Personnel number – 80001036

Notes:

[illegible]

Notes:

The OSC HR/Payroll SAP reports are accessed via the SAP Easy Access screen, or by using the applicable transaction code. The reports are categorized according to employee, organizational management, documents, administration compliance and administration garnishments.

Since the report output is determined by your security role, you will only see those employees for which you have been given security access.

Executing a Report

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Notes:

When you have entered all of the selection criteria, click the **Execute** button to run the report.

Sometimes when you are running a report, or performing other transactions, the system may seem to be taking an inordinate period of time. You can stop the transaction by clicking the icon at the top left of the screen, and selecting **Stop Transaction** from the menu.

Print a Health Plan: Not Yet Enrolled Letter



Health Plan: Not Yet Enrolled

Reminder Dates

06/19/2008

to

06/26/2008

Personnel Area

to

Personnel Subarea

to

Org Unit

to

Employee Number

to

Num of Days before Expiration

7

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Notes:

The Health Plan: Not Yet Enrolled Letter can be used to identify employees that have not selected a health plan during the new hire event. The letter is also used to communicate to the employee that they have not selected a health plan during a new hire event. The transaction should be run weekly by Agency Benefits Specialists.

Use SAP transaction code **ZBNS012** to print a Health Plan: Not Yet Enrolled Letter.

Displayed is an example of the initial screen utilized before printing a Health Plan: Not Yet Enrolled Letter.


Many variables are available when generating a Health Plan: Not Yet Enrolled Letter:


- Reminder Dates
- Personnel Area
- Personnel Subarea
- Org unit (Organizational unit)
- Employee Number (Personnel Number)
- Number of days before Expiration

It is possible to populate all of the above fields with a list or range of numbers, but it is preferred to use the defaulted Remainder Dates and the defaulted Number of Days before Expiration fields.

Print a Health Plan: Not Yet Enrolled Letter

(continued)





STATE OF NORTH CAROLINA
1425 MAIL SERVICE CENTER
RALEIGH, NC 27699-1425

WALDO EARP
4250 KINSTON ROAD
KINSTON, NC 28584-0000

PERSONNEL NO. 70231073
PERSONNEL AREA Transportation
PAYROLL AREA NC Biweekly

Date: 11/26/2007

We are notifying you of your eligibility to participate in one of the state sponsored health insurance plans. Our records indicate you have not enrolled at this time. You have until 12/05/2007 to enroll in one of the health plans.

Who is eligible to enroll in a benefit plan with the State Health Plan?

State employees with a permanent, probationary, time-limited or trainee appointment working at least 30 hours per week. For these employees, the state pays a portion up to 100% of the cost of the coverage, depending on the coverage option selected.

Permanent state employees working 20 or more hours but less than 30 hours per week. These employees may enroll, but they must pay the full cost of coverage.

Dependents' coverage, paid by the employee alone, is available at group rates.

New employees who enroll themselves and dependents within 30 days of employment are not subject to a waiting period for pre-existing conditions. If you decide to enroll at a later date, you will need to provide evidence of prior coverage or you may have a 12 month waiting period for pre-existing conditions.

How do you enroll? You have two options:
You can go online to Employee Self-Service to enroll (<https://mydeacon.nc.gov>) or
You can contact your agency representative for an application packet.

How soon will your coverage be effective?
You may elect coverage the first of the month after you become eligible.
You may also elect the first day of the second month after you become eligible.

Premiums will be deducted from your paycheck on a pre-tax and prepaid basis. For additional information or to inquire about your next opportunity to enroll in one of the health plan options, you can visit the State Health Plan website at www.shp.state.nc.us or speak with your Agencies Human Resources Department. You may also contact the BestShared Service Center at 1-866-NCBEST-4U. If you have already enrolled, please disregard this letter.

Thank you,

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This is an example of a Letter informing an employee that he/she has not yet enrolled in a health plan.


Notes:

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4.3 - Walkthrough

- Print a Health Plan: Not Yet Enrolled Letter
- Information:
 - Use BPP **ZBNS012** Print a Health Plan: Not Yet Enrolled Letter
 - Reminder dates: 04/01/2008 to current date
 - Employee number: 80000000 to 80000500
 - Number of days before expiration: (blank)



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Office of the State Controller

Notes:



Watch as the Instructor demonstrates how to access the Print a Health Plan: Not Yet Enrolled Letter using the **ZBNS012** transaction. The **ZBNS012** transaction allows you to preview the letter online or print it locally.

1. Select as many people as you want from the list of employees.
2. Click on the Letter Icon.
3. Open a print preview.
4. Explore next page and previous page functions.




Print a Leave of Absence (LOA) notice letter



LOA Continuation Notice

Selection

Personnel Number	<input type="text"/>	
Personnel area	<input type="text"/>	
Organizational unit	<input type="text"/>	

Date Selection

Date	<input type="text" value="01/01/2008"/>	to	<input type="text"/>
------	---	----	----------------------

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Office of the State Controller

Notes:

This transaction is used to provide the LOA letter for all employees on a LOA for the selected period. The transaction should be run weekly by Agency Benefits Specialists.

Use SAP transaction code **ZBNS008** to print a Leave of Absence (LOA) notice letter.

Displayed is an example of the initial screen utilized before printing a Leave of Absence (LOA) notice letter.

It is a simple report screen requiring the input of:


- A Personnel number, a list of Personnel numbers, or a range of Personnel numbers.
- A Start Date and an End Date.
- The dates used in the Date Selection area will identify employees whose LOA Start Date are in the range entered.

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Once the transaction is executed, the letter can be displayed and printed. Pictured is an example of the LOA letter generated.

http://www.osc.nc.gov/BEST/support/support_bn.html



Print a Benefits Termination letter

Benefits Termination Letter

Selections from

Selection		
Personnel Number	<input style="width: 80%;" type="text"/>	↔
Employment status	<input style="width: 80%;" type="text"/>	↔
Personnel area	<input style="width: 80%;" type="text"/>	↔
Personnel subarea	<input style="width: 80%;" type="text"/>	↔
Employee group	<input style="width: 80%;" type="text"/>	↔
Employee subgroup	<input style="width: 80%;" type="text"/>	↔
Organizational unit	<input style="width: 80%;" type="text"/>	↔

Date Selection

From

to

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Notes:

Purpose of Printing a Benefits Termination Letter


This transaction generates a letter that can be provided to terminated employees outlining their continued options for benefits after employment ends. The transaction should be run weekly by the Agency Benefits Specialists.


Use SAP transaction code **ZBNS013** to print a Benefits Termination letter.

Many variables are available when generating Benefits Termination letters including:

- Personnel Number
- Employment status
- Personnel area
- Personnel subarea
- Employee group
- Employee subgroup
- Organizational unit
- Start Date and End Date
 - The dates used in the Date Selection area will identify employees whose Benefits Termination date are in the range entered.

Print a Benefits Termination letter (continued)





STATE OF NORTH CAROLINA
1425 MAIL SERVICE CENTER
RALEIGH, NC 27699-1425

Benefits Termination Notice

Christa Fernandez
842 Honeyuckle Lane
Chantilly, NC 27609

Personnel No. 8000048
Personnel Area Environment Natural Resources
Payroll Area NC Monthly

Date 06/19/2008

This letter is to notify you that your state-sponsored benefit plans have ended due to Separation. It is for informational purposes only. Continuation of coverage, conversion or portability options may be available based on each plan's specifications. You will need to make satisfactory payment arrangements and complete any necessary forms based on each plan's requirements and deadlines. We will notify each vendor of the date your plan(s) will end. It is not the intent of this letter to replace or supercede any documents you receive from each plan directly. If you have any questions about the information you see below, please contact the Benefits Support Center at 1-866-NCBEST-4U.

If you are enrolled in any group life, accident, disability, dental, or cancer plans offered through your agency, please contact your Human Resources Representative directly to discuss your continuation options.

Coverage	End Date of Coverage	Continuation Options
PPO - Smart Choice Plans	12/31/9999	<p>The State HealthPlan will send you information outlining your continuation options, mailed to your last known address.</p> <p>You may continue coverage by paying the full cost (both the employer and employee costs) plus a 2% administrative fee by the dates the vendor indicates. You can also contact the State Health Plan with questions. For PPO Options questions, contact 1-888-234-2416.</p> <p>If your coverage ended due to retirement, you may be eligible to continue your health insurance through the Retirement System. Please contact your agency representative to see if you qualify and to inquire</p>

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Once the report is executed, the letter can be displayed and printed.

This is an example of a letter informing employees that their benefit participation in an enrollment program has been terminated.


Notes:

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4.4 - Demonstration

- Print a Benefits Termination letter
- Information:
 - Use BPP **ZBNS013** Print a Benefits Termination letter
 - Employee: Christa Fernandez
 - Date: 01/01/2008 to current date



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Watch as the Instructor demonstrates how to access Print a Benefits Termination letter using the **ZBNS013** transaction. The **ZBNS013** transaction allows you to preview the letter online or print it locally.

Notes:

Additional Reporting – BI Reports

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Notes:

Lesson Review

In this lesson, you learned to:

- Print Benefits Confirmation Forms
- Print Benefits Letters



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Notes:

Course Map – Benefits Display Overview


Lesson 1: Benefits Process Overview

Lesson 2: Employee Participation Overview

Lesson 3: Benefits Infotypes

Lesson 4: Benefits Letters and Reporting

Lesson 5: Course Review




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Notes:

Course Review

- Display Employee Benefits
 - In this exercise, you need to check the details of Marvin Tillman's benefit record. He is an employee who has had several life change events. He has phoned you and needs you to access his benefits to determine their current status.
- Instruction
 - Use transaction **HRBEN0006** and **PA20**.
 - Select the employee.
 - View the employee's Benefits Data and answer the questions listed on the next slide.



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Course Review: Display Employee Benefits

Scenario:

You need to check the details of an employee's benefit record.


Work Instruction #: Participation Overview, transaction code **HRBEN0006** and **PA20** Display HR Master Data

Instructions:

1. Use transaction code **HRBEN0006** and **PA20**.
2. Select the employee, **Tillman**
3. Redo the search by entering both the first and last name
4. View the employee's Benefits Data and answer the questions listed in the following slides.

Notes:

Course Review




Questions	Answer
What is the effective date of almost all of Marvin's benefits?	
How many family members or dependents does Marvin have in OSC HR/Payroll? Where did you go to find the answer?	
Who are his family members?	
How much is Marvin contributing for his pre-tax Health Care FSA?	
Where can you find Marvin's SSN and what is it?	
What is the effective date of his Retirement enrollment?	
Why is his retirement enrollment date different than the rest of his benefits?	
What special indicators are listed on Marvin Tillman Jr's record?	
How many adjustment reasons are included in Marvin's record?	

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Notes:

Questions



PARKING LOT

?



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Notes:

Next Steps

- Monitor OSC HR/Payroll communication
 - BEST Shared Services web site (especially the Updates tab)
 - URL: <http://www.osc.nc.gov/BEST/>
- Review conceptual materials
- Access BEACON Help
 - Access from an SAP transaction
 - URL: <http://help.mybeacon.nc.gov/beaconhelp>
- Practice what you've learned
 - URL: <https://mybeacon.nc.gov>
 - Client 899
 - Use your current NCID user name and password



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Notes:

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

Follow the link provided above to access the training client on the OSC HR/Payroll website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access BEACON Help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON Help from within an SAP transaction.



CONGRATULATIONS



You have completed the course

Please complete your course evaluation!

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To help determine the effectiveness of the training, please complete an online Evaluation form. Your feedback is an important part of continuing to improve the effectiveness of the HR training courses.


Notes:

Course Review (Answers)

Questions	Answer
What is the effective date of almost all of Marvin's benefits?	Feb 1
How many family members or dependents does Marvin have in OSC HR/Payroll? Where did you go to find the answer?	4 Master Data tab
Who are his family members?	Cynthia, Marvin Jr, Charles, Tiffany
How much is Marvin contributing for his pre-tax Health Care FSA?	\$125
Where can you find Marvin's SSN and what is it?	Master Data tab 402-39-3695
What is the effective date of his Retirement enrollment?	01/01/08
Why is his retirement enrollment date different than the rest of his benefits?	Retirement enrollment begins the month of hire
What special indicators are listed on Marvin Tillman Jr's record?	Disability Student Indicator
How many adjustment reasons are included in Marvin's record?	3

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Notes: